INTRODUCTION

Welcome to the Operation Protect Montana (OPM) system for Adult Protective Services!

This document serves as a user guide for the OPM system. The goal of this user guide is to provide you with a supplement to use during classroom training and to serve as a follow-up resource when you return to your office. This user guide is organized in nine logical segments and will cover the following areas of the system:

1. SYSTEM OVERVIEW

In this section, you will learn:

- How to create a desktop shortcut or add to your favorites
- How to change the screen resolution
- How to properly login and logout of the system
- How to change your password
- How to use the Outlook link to e-mail the APS Help Desk
- Information regarding system security
- Information regarding general system navigation
- How to use the navigation menu buttons
- How to use the quick access fields and buttons
- Information on the system time out process
- How to identify required fields
- Information regarding confirm messages

2. ALERTS

Alerts are reminders you will receive to remind you if an action is due or if an action has already taken place on behalf of a referral or case. In this section, you will learn:

- How to view alert messages and identify the alert source and due date
- How to remove (delete) an alert
- How to process an alert if an action is necessary or required
- How to create an alert for yourself or another worker
- Information regarding system generated alerts

3. PERSON SEARCH AND PERSON DETAILS

All victims, associated persons and persons of interest must have a person ID associated to them. This is accomplished by searching for the person and then adding them on the person detail page (if they do not already have a person ID). When adding a person to the system, you will also be able to add various details for the person. In this section, you will learn:

- How to perform a person search
- How to interpret person search results
- How to add a new person to the system

- How to add person demographics
- How to add telephone numbers
- How to add tribal affiliation
- How to add provider information
- How to add insurance information
- How to add legal information
- How to add associated persons
- How to add address details

4. REFERRALS

This section covers how to enter the details associated with an APS or API referral. In this section, you will learn:

- How to enter the main referral details
- How to transfer a referral to another worker
- How to enter referent information
- How to enter victim information
- How to enter allegations and determinations
- How to enter person of interest information
- How to enter a narrative summary
- How to disposition a referral
- How to change a referral category from API to APS
- How to enter referral services
- How to enter referral Medicaid services
- How to delete a referral
- How to complete a referral acuity assessment

5. CASE MANAGEMENT

This section covers how to enter the details associated with the ongoing case management of a client. In this section, you will learn:

- How to enter the main case management details
- How to transfer a case to another worker
- How to enter a narrative summary
- How to enter intervention assessment criteria
- How to disposition a case
- How to enter services
- How to enter Medicaid services
- How to enter court actions
- How to delete a case
- How to complete a case acuity assessment

6. HISTORIES

The system will provide you with several history pages to help you identify referral and/or case involvement for a specific person or worker. You will also have the ability to combine narratives that have been entered on referrals and/or cases for a specific person. In this section, you will learn:

- How to view worker assignment history for a referral or a case
- How to view the acuity history for a referral or a case
- How to view a history of all referrals where a specific individual has been identified as a person of interest
- How to view a history of all open and dispositioned referrals and case management where a specific individual has been identified as a victim or a client
- How to create a combined narrative summary for a specific person

7. FILES AND DOCUMENTS

The system gives you the ability to attach files to a person. These files could be a document containing case notes, a scanned court order, or pictures you took while completing an investigation. The system also gives you the ability to create documents used during the investigation and guardianship processes. In this section, you will learn:

- How to retrieve and view files that have been attached to a person
- How to attach files to a person
- How to create documents such as the Investigative Summary Report, the Annual Account of Guardian Report, the Petition for Approval of Annual Account of Guardian / Conservator and the Face Sheet

8. WORKER INFORMATION

Various types of worker-related information can be found on three different lists. In this section, you will learn:

- How to access a list of APS workers by region, state or Central Office
- How to view details for a specific worker, including caseload exception information
- How to access and view your caseload list or the caseload list of another worker
- How to access a specific referral or case from the caseload list
- How to access and view your workload list or the workload list of another worker
- How to access a specific referral or case from the workload list

9. SYSTEM REPORTS

The system will create several reports based on the information that is entered into the system. Supervisors and Central Office staff will request these reports.